Site # _____

Getting Data From Your Practice Management System

Step 1: Initial Setup - 3 Month Report

This one-time-only setup helps ensure that the PhoneTree software has all the information needed to incorporate data from your appointment schedules into automated messages. Because not every appointment type or provider might be represented on your daily appointment report (for example, a certain provider may be on vacation at the time of report creation, therefore showing no appointments), you will initially set up PhoneTree to read from an appointment report showing three months of appointment information. This guide will show you how to create this report.

Step 2: Daily Operation - Daily Report

Once your PhoneTree system has seen all possible providers, appointment types, and other information for three months out, then you're ready to create your daily report, from which PhoneTree will make calls on a daily basis. This will be almost exactly like creating a three-month report, except that it will show appointments only for the upcoming day. It is from this report that PhoneTree will create messages each day. After your PhoneTree has been configured with a 3-month report, you will be able to import a daily report with the instructions provided here.

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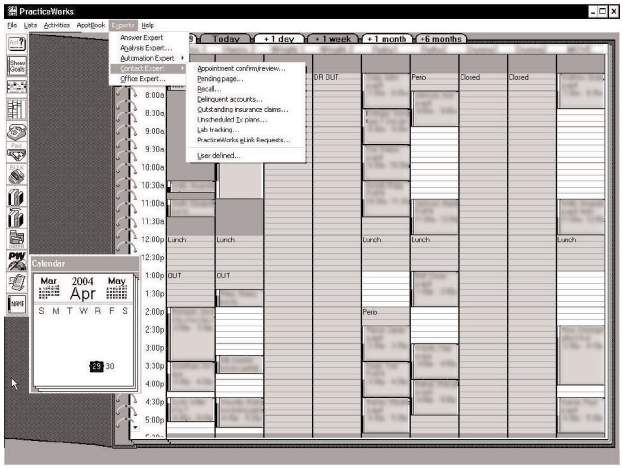
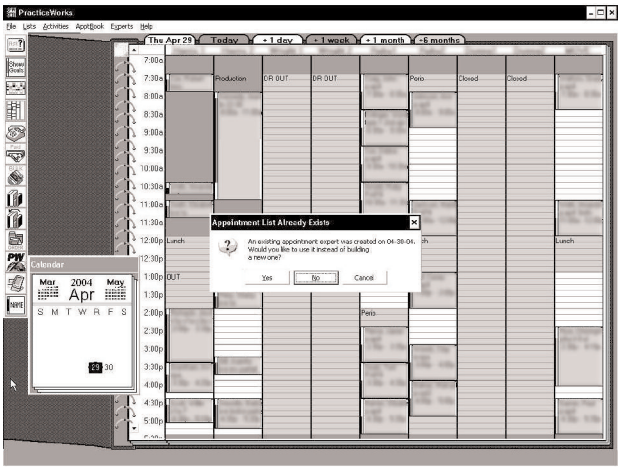
Getting Data From Your Practice Management System

PracticeWorks: Appointments - 3 Month Report

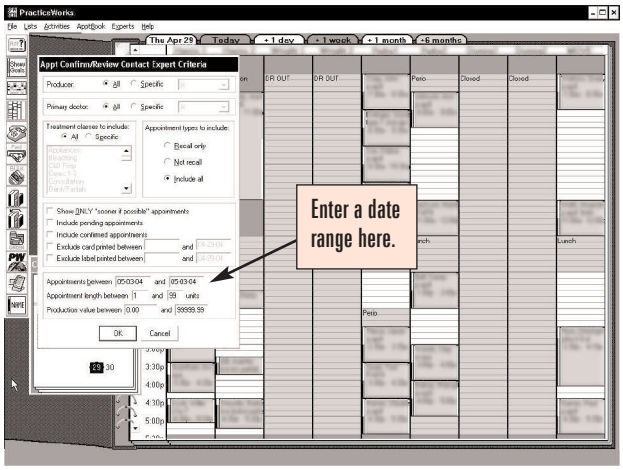
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. This one-time step is required for correct configuration. Here's how to do this using the PracticeWorks system:



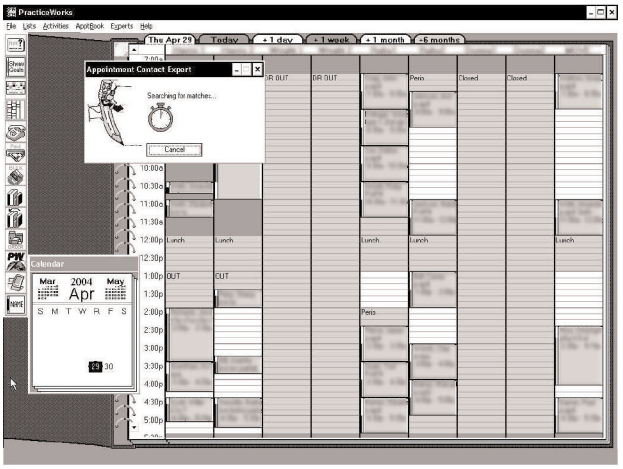
1. Open PracticeWorks to the main screen. From the **Experts** menu, choose **Contact Expert -> Appointment Confirm/Review.**



2. On this **Appointment List Already Exists** dialog, click the **No** button.



3. On this next **Appt Confirm/Review Contact Expert Criteria** screen, choose a 3 month date range by entering a start and an end date next to **Appointments between** [choose date] **and** [choose date]. For instance, if today was 4/4/06, enter 4/4/06 in the first box and 7/7/06 in the second box. Select any other criteria that should apply to this report. Click **OK**.



4. This screen shows the file being built.

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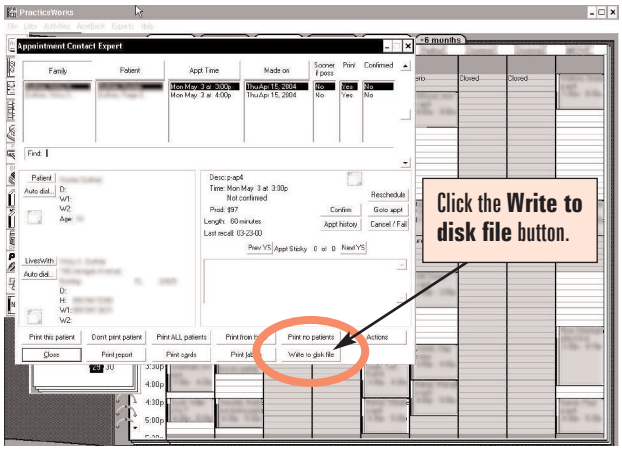
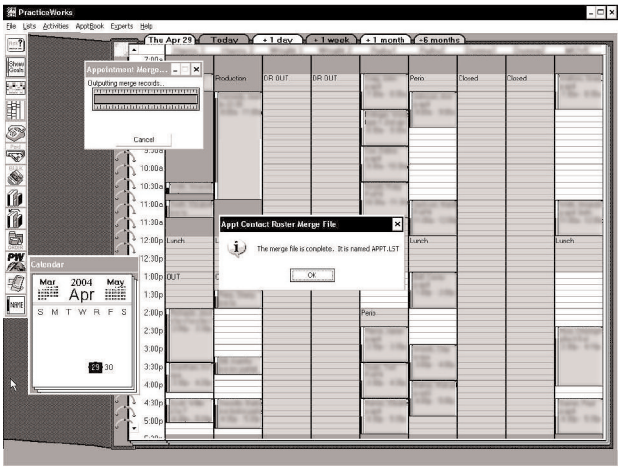
Getting Data From Your Practice Management System, continued



5. Now the **Appointment Contact Expert** window appears. Click the **Write to disk file** button.



6. The file will be created and a confirmation dialog will appear. PracticeWorks will name the file **Appt.lst** by default. That's it–you're done!

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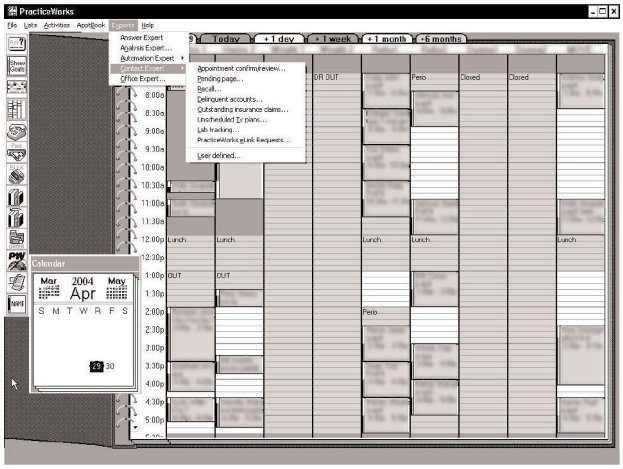
Getting Data From Your Practice Management System

PracticeWorks: Appointments - Daily Report

In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. Once configured, each day PhoneTree will read this file and use it to make calls. Here's how to do this using the PracticeWorks system:



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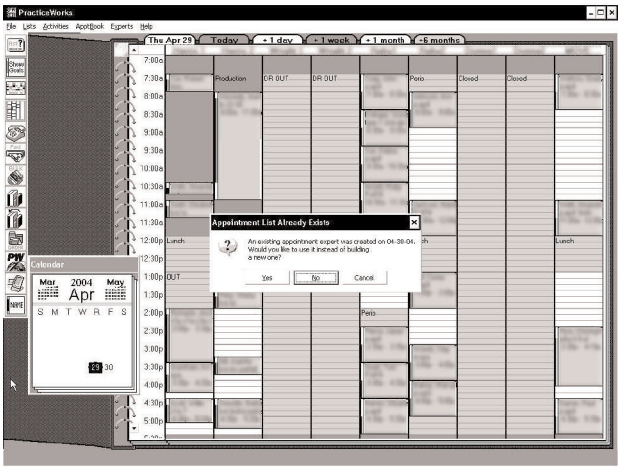
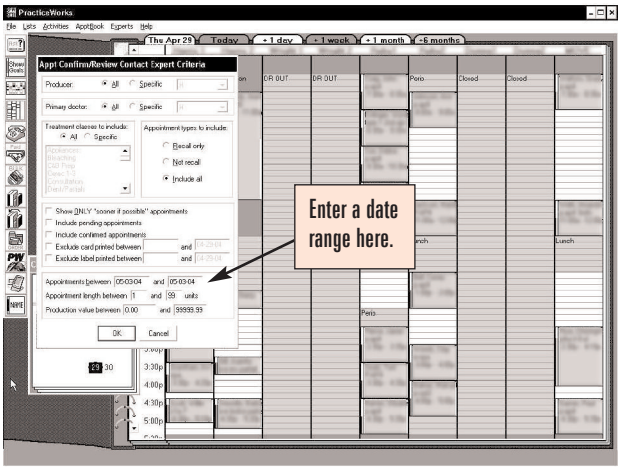
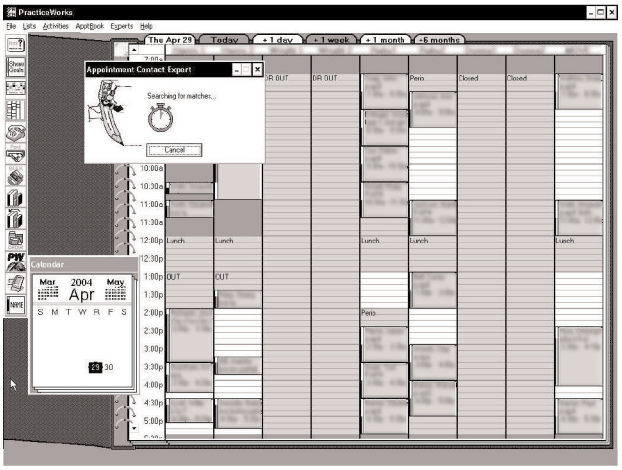


2. On this **Appointment List Already Exists** dialog, click the **No** button.



3. On this next **Appt Confirm/Review Contact Expert Criteria** screen, choose a date range that reflects the date you wish to confirm appointments for. Enter a start and an end date next to **Appointments between** [choose date] **and** [choose date]. For instance, if you want to confirm tomorrow's appointments, choose tomorrow's date in both boxes. Select any other criteria that should apply to this report. Click **OK**.



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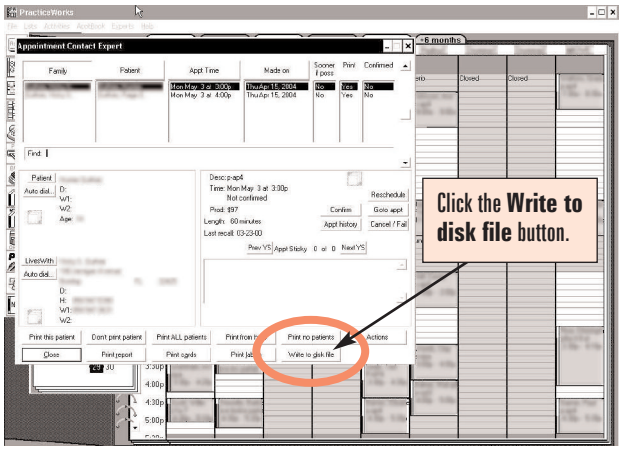
Getting Data From Your Practice Management System, continued



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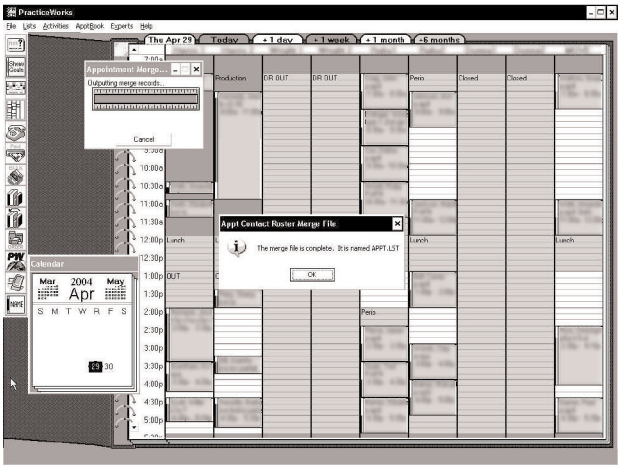

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